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ABSTRACT

This working paper focuses on methods for developing a study program on scientific and technical information users that could serve as a subject of study in the academic preparation of librarians, archivists, and scientific and technical information specialists. Recognizing that in most schools for training specialists of scientific and technical information, emphasis has been placed on the systems themselves (notions of management, administration, and of the organization and procession of information), this paper suggests that more emphasis must be placed on the beneficiaries or receivers of the systems, i.e., the users. Topics addressed include the problem; the level of education and training; orientation of programs; training institutions and orientations of teaching; training of teachers; teaching materials and equipment; pedagogy; the role of professional associations; and the principal conclusions. References and notes are included. (THC)

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THE TEACHING OF USER STUDIES AS A SUBJECT FOR THE PREPARATION OF LIBRARIANS, DOCUMENTALISTS, ARCHIVISTS AND OTHER INFORMATION SPECIALISTS

by H. SENE

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TABLE OF CONTENTS

	Paragraphs
INTRODUCTION	1 - 10
THE PROBLEM	11 - 17
THE LEVEL OF EDUCATION AND TRAINING	18 - 25
ORIENTATION OF PROGRAMMES	26 - 30
TRAINING INSTITUTIONS AND ORIENTATION OF TEACHING	31 - 36
TRAINING OF TEACHERS	37 - 40
TEACHING MATERIALS AND EQUIPMENT	41 - 45
PEDAGOGY	46
ROLE OF PROFESSIONAL ASSOCIATIONS	47 - 48
RESUME OF THE PRINCIPAL CONCLUSIONS	49 - 53
REFERENCES AND NOTES	

The material contained in frames at various points in the text has been added by the Secretariat to encourage discussion

INTRODUCTION

1. Unesco's policy in scientific and technological information has always had as primary objectives :

- to encourage and develop the transfer and exchange of scientific and technical information among all its Member States ;

- to arrange access for the largest possible number of users to the documentary resources available at the national or international levels.

2. This policy was applied, especially for the developing countries, through the elaboration of standards and guidelines for the handling and diffusion of information, the establishment of professional training programmes and support for the creation of national information infrastructures. The UNISIST programme, set up in 1972, was intended to sustain this entire policy.

3. As concerns particularly the users of scientific and technical information, the programme was aimed at the national level to "ensure a basic training in the use of existing information sources, to obtaining feedback from users on the results of information needs studies, and to involving as wide a range of users as possible in any new experimental service." (1)

4. Since then, Unesco has published several titles concerned with user education and training. Among these is the important guide for the education and training of users of scientific and technical information prepared by A.J. Evans, R.G. Rhodes and S. Keenan which was published in 1977 (2). In addition, seminars on training users of documentary information services, organized within the UNISIST framework, made it possible to consider carefully the place and the importance of users in library, archives and scientific information services on the one hand, and on the other , the possibilities for them to make use of the available information.

5. Seminars held in 1976 in Rome and in Bangkok (3) were intended to open the way for the elaboration of proposals and of guidelines for setting up training programmes for users of scientific and technical information (4, 5).

6. These different programmes are based on the principle that "the final goal of every single library, documentation centre, information service, national information system or regional network is to serve the users of information. Users of information are an integral part of and the final link in the information transfer chain ; they are the "'raison d'être' of every investment made for bettering the storage, processing and retrieval of information... Unless these users know how to find relevant information available to them, the information 'machinery' falls short of its main goals" (6). It is therefore necessary to train users in the techniques needed for locating the information they require.

7. Thus at present in almost all industrialized countries, and in some developing countries, users of documentary services are initiated in research techniques. It must be noted, however, that this training, while not always offered within academic programmes, is generally given in universities and some research centres. Such training is usually directed to students, teachers, research workers and technicians.

8. These courses are generally intended to facilitate the maximum use of existing documentary resources. In fact, the limited appreciation of the advantages which information brings to all research processes, the ignorance about information sources and their use and finally, the absence of clearly defined needs, are generally at the root of failure to make the maximum use of available information.

9. Information professionals -librarians, archivists and documentalists- are often the initiators and animators of these courses and seminars for the education and training of users. However, in spite of the positive results gained in certain training programmes, the question can be asked whether the professional education they have received in schools and institutes for training scientific and technical information specialists has really given many of them the competence, the preparation and experience needed to accomplish such teaching and training exercises for users of their documentary services in addition to the technical tasks which they undertake in the framework of operating these services.

10. The intention of this working paper is to study the methods of elaborating a study programme about users which could form a subject of study in the academic preparation of librarians, archivists and scientific and technical information specialists.

THE PROBLEM

11. To justify and understand the appropriateness of teaching courses concerning the users of information services intended for an audience of future librarians, archivists and scientific and technical information specialists, it seems important first to restore to the user the central place which he should occupy in every communication and information process.

12. In fact, the justification and the ultimate measure of every information system whether set up at local, national or international level is found in its capacity to react in the most rapid and precise manner possible to the information needs of users.

13. To take up once more a Unesco definition, we understand here by the term users, "all potential beneficiaries of a national information system, and not just those who would be using the facilities at a certain time. Such potential beneficiaries include individuals, enterprises, government agencies, and other organizations that use information regularly to make informed decisions and to achieve particular goals. Indeed, potential users are nearly everyone". (7)

14. However we must recognize that in most of the schools for training specialists of scientific and technical information and documentation, emphasis has often been placed more on the systems themselves (notions of management, administration and of the organization and processing of information) than on the beneficiaries or receivers of these systems, that is, the users.

15. Certainly the function of dissemination occupies an important place in the documentary chain, but it too often appears to be only the corollary of the setting up of information systems.

16. But experience shows that "the act of documentation does not stop when one has edited a bibliography or compiled a card or automated catalogue. It is still necessary to have the information reach all those to whom it could be useful and therefore to be concerned with user education and training"(8).

17. This means that the librarian, archivist or documentalist must be able to provide for the users of their services the best possible use of the available documentary resources by teaching them techniques which will enable them to draw maximum profit from those resources. From then on the information professional will no longer be only a technician or a manager of more or less sophisticated systems. He will also need to play an educator's and trainer's role for the users of his services.

In the light of paragraphs 11-17, to what extent should training programmes suggest that every information service has an obligation to identify the needs of the population it tries to serve and to make its services responsive to those needs ?

The underutilization of existing information services, particularly in the developing countries has often been pointed out. Could the undertaking of user studies aid in solving this problem ?

Considering that user studies are often defined as studies concerned with the needs of individuals or groups for information and their behaviours in seeking and using information, to what extent is it important that training programmes :

- familiarize students with the nature and scope of user studies and their importance in information service development and management ?
- familiarize students with the range of past user studies and their broad findings ?
- familiarize students with the techniques and methods for designing, conducting and evaluating user studies ?

THE LEVEL OF EDUCATION AND TRAINING

18. Teaching about users of documentary services should be addressed in priority to the students enrolled in professional training schools. Called on to manage the information which users need , they will be the best interlocutors between the users and the information. They will need, then, to have been provided during the course of their professional preparation, with the tools required, once in an actual working situation, to better identify the different kinds of users and to evaluate their needs and their problems in order to improve their research capacities and their access to information.

19. A continuing education programme could be set up for professionals who have already received training in the various information sciences and techniques. Librarians, archivists and professional documentalists are, in fact, generally those who support and guide users in documentary services. In the area of research they tend to be the ones who are best acquainted with the techniques of documentary research, who have a certain knowledge of user needs and who sometimes are themselves research workers in a particular field.

20. Continuing education programmes for them could be offered either in professional training schools or in documentary services. These would allow participants to improve the services they offer to users in the area of research. This will be accomplished through the use of better teaching methods as well as the introduction of the technological innovations frequently found in the fields of research and of information access.

21. Para-professional staff, generally trained on the job, and whose level of general education often remains rather low, could be included in the continuing education programme. Assisting professionals in the reception of and assistance to users, the para-professionals contribute also to the effective operation of documentary services. By participating in this continuing education programme, many of them could raise their academic level, improve their technical knowledge and aspire to professional careers.

22. These programmes, if offered to professionals, could be introduced into existing training programmes, and complete them, either in the form of specific courses of a kind already offered in some schools or within the framework of other subjects which cover the handling and dissemination of information. Teaching about users should, in addition, be offered in professional training schools at university level.

23. An ideal testing ground for such programmes of study exists, both in developing and developed countries, through the research structures of universities, their computerization capacity, their numerous documentation infrastructures, the highly qualified teaching and professional staff as well as the intellectual and cultural level of the potential users that frequent them.

24. It is necessary, too, to envisage a high level professional specialization in those countries where the user is expected to employ the most up-to-date technology in the search for the information he requires. In fact, in conducting their research, users are more and more often expected to operate documentary tools which require a certain technical knowledge. This is particularly the case for automated information systems. It is now up to the information specialist to acquire not only full knowledge in the area of the techniques of documentary research but also the teaching and the technical skills required to introduce users to the operation of certain equipment.

25. In some cases too, his professional preparation should be completed by a solid academic training (at doctoral level) to allow a fruitful dialogue with those users whose specialities require specific consideration (professors, researchers, engineers, scientists, technicians, etc.).

With reference to paragraph 22 is it considered preferable to present "user studies" as a single independent course or module or to break them up and incorporate such elements of the subject as "information marketing" or "research methods" in other areas of the curriculum ?

Should the teaching described in paragraph 18 also incorporate material to acquaint managers and future managers of information services with the skills and techniques needed to plan and conduct studies of present and potential user's needs and/or to evaluate the evidence collected by others ? Many entering the profession will not be skilled in social research techniques.

ORIENTATION OF PROGRAMMES

26. Because of the wide differences among countries, and sometimes even within a single country, it is difficult in the present case to propose uniform lines for such teaching. To this is added the gap which exists between developed and developing countries with respect to the organization of documentation, to the general level of the qualification of personnel as well as to the material and technical resources put at the disposal of users. Nevertheless one can say that any teaching programme devoted to user studies should take into account a number of parameters :

- socio-cultural environment of users
- level of alphabetization of users
- level of economic and social development of the country
- state of national infrastructures of information and documentation
- level of training received by the personnel of information and documentation services
- general research orientations and information needs at the national level

27. The items listed above are clearly what will bring about a difference in professional education depending on whether one is in a developed or developing country. The teaching offered in the United States of America or Canada for the professional information workers in those countries will be based on experience, on technology and research policies which have nothing in common with what might be proposed for a developing country.

28. The result of such teaching should however be the same everywhere, that is, to give to librarians, archivists and documentation specialists, the theoretical and practical knowledge needed for a better understanding of their users as well as an improved grasp of the techniques of information research for a maximum exploitation of the available documentation resources.

29. Because of the differing levels of technological development among countries and keeping in mind the parameters mentioned above, it is impossible to elaborate standards on the basis of which a single curriculum could be used at the same time in developed and developing countries. It is, of course, true that the latter will be able to profit from the experience gathered in the industrialized countries by using certain modern tools and techniques for the benefit of their own users. it remains evident, however, that any curriculum for users will have to be designed to correspond with the cultural, economic and social realities of the countries concerned.

30. While the goals and objectives of the training may be the same, the approach to the conception of a teaching programme for users will be different at international, regional or national levels, depending on the level of each country or group of countries and on national characteristics which, in a large measure, determine the priorities and the information needs of users. In the poor countries, the increase of food and industrial production, the improvement of public health levels, the increase of school enrollments are objectives which correspond to the information needs of sectors where users and the problems which they face are different from those which present themselves in the developed countries.

Would it be desirable to add parameters, including the following to the list in paragraph 26 as basic considerations for preparing teaching programmes on user studies ?

- the paramount place of the user in the development and management of library and information services
- training in research methods

With respect to paragraphs 27 to 30 -and particularly to paragraph 28- could there be an internationally acceptable framework for the course components treating research in users needs in general as opposed to the components dealing with designing courses for particular audiences (user training courses) ?

Would the distinctions indicated in the following table be useful internationally in establishing harmonized courses for users of an potential user of documentation, library and archives services ?

DIFFERENTIATION OF USER EDUCATION, USER ORIENTATION AND USER ASSISTANCE : Examples

User Education	User Orientation	User Assistance
Development of the motivation, propensity and potential for seeking and using information for problem-solving, development and self-educational purposes.	Provision of guidance for understanding the features of a specific information system or type of information system in relation to users' needs.	Help in understanding the subject coverage, limitations, etc. of a specific information source or data-base
Creating awareness of the availability of information relevant to different needs and situations.	Provision of guidance on the specific information sources accessible through a specific system.	Help in interpreting the data elements in an entry in a catalogue or a display on a visual display unit.
Creating awareness of the availability of different tools for and approaches to information searching and accessing.	Provision of guidance in the use of specific tools (e.g. catalogue, thesaurus, terminal operations) used in specific information system (s).	Assistance in abstracting, or repackaging work on information retrieved in relation to a specific query.
Developing the ability to extract, synthesize and repackage information to suit individual needs and convenience.	Developing familiarity with the outputs obtainable through a specific system.	

TRAINING INSTITUTIONS AND ORIENTATION OF TEACHING

31. The structure of institutions for preparing scientific and technical information workers varies a great deal from one country to another, and sometimes even within a single country. It is therefore difficult to state categorically whether the programme for each of the three professions should be offered in a single school or in different ones.

32. One can conceive of three variations :

1) a programme with a broad outline common to all the schools of a country or group of countries and which would be taught in each of them ;

2) a common programme for all the schools located in one country or a group of countries and which would be offered in a single institution ;

3) a distinct programme for each profession which would be offered in the different schools.

33. The problem can however be brought up in a different manner to avoid being paralyzed by the internal structure of training institutions. The fundamental consideration ought to be whether it is possible to conceive of a single training programme for the three branches of the profession or whether their specific characters require separate programmes.

34. In spite of the differences which characterize the management, the handling and the diffusion of information in the three professions, it seems that it should be possible, when teaching about users of information services, to identify similarities which would militate in favour of a programme established on a common base. Three reasons seem to support this concept :

1) the idea of the user tends to be the same in any information system whatsoever. He is before everything else a person who, faced with a specific problem, hopes to find rapidly a bit of data, a technique, a process, a method or a theory to answer his question. Only the documentary tools used to resolve this problem may differ from one system to another. One can therefore suggest that there does not exist a "standard" user for any particular documentary system.

2) the coordination of information systems at the national and international levels into networks can lead users to address themselves successively to several different systems and to find themselves therefore confronted with the same problems in their search for information. Information professionals have to deal more and more often with a type of user having similar attitudes when confronted with the potential resources even if their specific needs prove different.

3) the tools of documentary research, whether they be manual or automated, tend more and more to be the same, especially in the automated information area. Users attitudes, their capacities for using these tools and the problems they can meet, may be identical whether one finds oneself in a library, an archives service or a documentation centre.

35. It would be advisable to have training for information professionals based in practice on the common core idea. This formula presents a number of advantages. It preserves to the users' profit the complementarity and interdependence existing between the different branches of the profession. it should also allow, especially among professionals, reinforcement of the idea that satisfaction of the users' needs is the justification for any information system, whatever its organizational structure, its research orientations and its material resources.

36. It remains understood that in practice common core teaching will only provide a common base, which should not mask what is distinctive in the material organization of one or another sector of the spectrum of information. It will be necessary, on the contrary, to provide professional workers with an improved understanding of the differences, when these exist, in order to arrive at a reciprocal improvement of research methods and techniques, and this to the greater profit of users.

TRAINING OF TEACHERS

37. A course about users for an audience of future librarians, archivists and documentalists should prepare these information specialists to help users by introducing them to documentary research techniques and guiding them in designing their research strategies and in the use of documentary tools At the level of professional schools, this really means training future trainers in the area of documentary research.

38. These different objectives will have to be taken into consideration in preparing teachers for professional schools. They require not only a solid technical and professional training reinforced by practical experience in information services but also high level academic studies in a relevant field of the human or exact sciences. It would finally also be desirable that they have done research.

39. In summary, these teachers should possess the following qualities to allow them to efficiently undertake the education and training of future information professionals :

1) have professional experience
2) have a thorough knowledge of the methods and techniques of research in information
3) have good academic training in a given field
4) be good teachers

40. One could imagine then two profiles for teachers :

1) those with practical professional experience and sufficient academic qualifications to teach at the university level. It would only be necessary for them to acquire certain pedagogical and psychological skills in order to establish or improve their teaching skills. This training could take the form of seminars or of courses offered in the relevant departments of universities ;

2) those who come directly from the teaching profession and who have a speciality in the human or exact sciences. This category of teachers will need to become generally acquainted with the sciences and techniques of information and in particular with research techniques in the information field. This training, which could require a longer period of study, should be undertaken in a professional training institution and be accompanied by practice work in information services or research institutes.

TEACHING MATERIALS AND EQUIPMENT

41. The elaboration of a teaching programme in a professional training school always requires an important emphasis on teaching materials and equipment because of the practical aspects of that training. It is necessary only to mention those regularly used to support courses, especially audio-visual materials : overhead projectors, film or slide projectors, tape recorders, etc. ; teaching a subject such as that dealing with users also requires that students have access to the most important tools for documentary research in order to become familiar with their use and to allow them to undertake, themselves, some actual research work.

42. It is also indispensable for schools to obtain automated equipment : micro-computers or terminals or, for want of these, access to the computerized resources available, especially within the universities. Acquiring material of this kind is a necessity for every school offering education and training in the various information sciences.

43. Indeed, such a choice is justified by the important role now played by informatics in the management of information systems as well as in research and in gaining access to information on the part of both information professionals and users.

44. A practice library attached to the training institution will serve as a fundamental teaching aid for the preparation of future information professionals. Such libraries should be conceived rather as laboratories where students could not only acquire theoretical and basic knowledge, but also practice documentary research.

45. A facility of this kind should of course contain the most important tools for documentary research such as bibliographic catalogues, abstracting and indexing bulletins, guides to reference materials, etc. It would also be useful to arrange access for the students to research centres to provide actual contacts with those who in the course of their daily activities constantly use documentary information services.

PEDAGOGY

46. There need not be a great departure from what is done traditionally in teaching and professional education and training. As concerns especially the course about users in information services, the stress should be placed on the characteristics and the final goal of library, archives and documentation services with respect to their socio-cultural and economic milieus and with respect to the users (psychology, needs, profile, training). Case studies, inquiries and research work followed by practice work should be used as practical exercises to complete the theoretical teaching.

ROLE OF PROFESSIONAL ASSOCIATIONS

47. While professional associations do not regularly intervene in the setting up and development of teaching programmes except in a few countries, they may, however, play an important role in the continuing education of information professionals. In many countries these associations, which have as their purpose to promote the profession and to defend its material and moral interests, are often responsible for organizing seminars or retraining sessions for professionals working in information services. Education and training of para-professional staff could also be organized and taken in hand by professional associations.

48. In another optic associations can play an important role in publicizing to users, through organized campaigns, the importance of the development of national information and documentation infrastructures for a better use of the national documentation potential.

RESUME OF THE PRINCIPAL CONCLUSIONS

49. The education and training of librarians, archivists and documentalists has traditionally emphasized the creation, the organization and the management of information systems, the user being considered as an entity who should find his place as best he can in the framework set up. However, these systems really have no meaning and usefulness except in relationship to the satisfaction of users needs. From this arises the need to know users better in order to serve them better. The purpose of this working paper is to sketch an outline of what might constitute a teaching programme on "user studies" to be used for preparing future librarians, archivists and documentalists.

50. Setting up some kind of teaching on users in professional schools has become a necessity. it is justified by the increasing complexity of information services, the increase in the number of information sources and the use of more and more sophisticated materials and techniques for storing, transferring and retrieving information.

51. Such teaching is often offered by information professionals either within their services or through education and training structures (schools, faculties, institutes). But the nature of the preparation the information professionals have received does not always equip them to take on this task with all the skill and efficiency required. From this arises the necessity for providing within the curricula of professional schools a course on users.

52. Intended in priority for the students of these schools or for professionals (continuing education), the final goal of this teaching of university level will be to better acquaint future information specialists with the different types of users and their needs in relation to the realities of the socio-cultural milieu. It will also foster an improvement in the research capacities and the information access of users.

53. Thus the specialist of documentary information will be not only a technician trained in the execution of documentary tasks, but will also be able to play a role of support to users with a view to enabling them to raise their research capacities to the highest point.

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